

FIG. 1

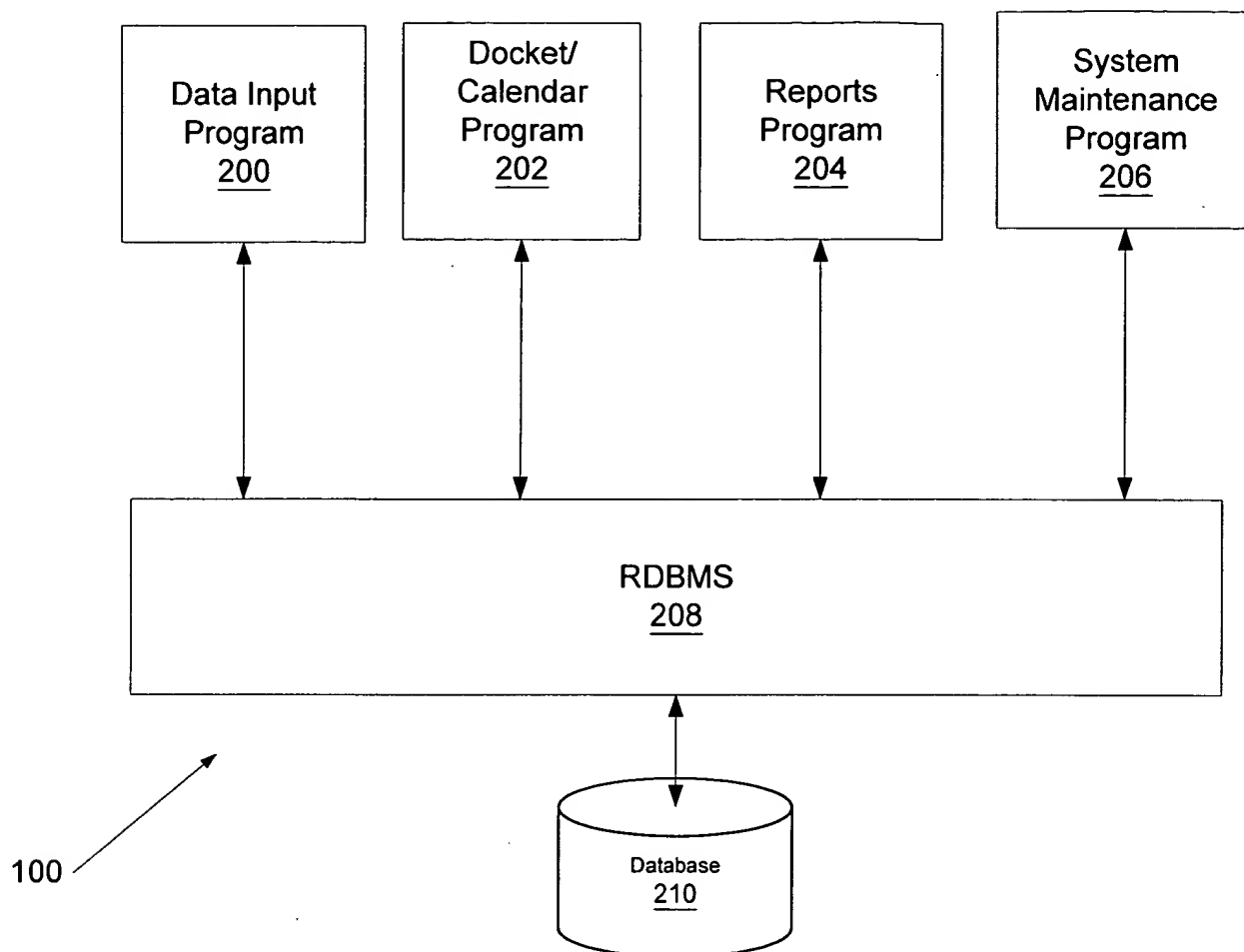


FIG. 2A

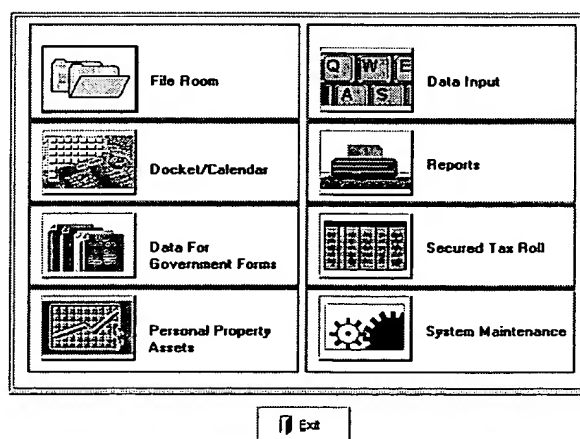


FIG. 2B Main Window

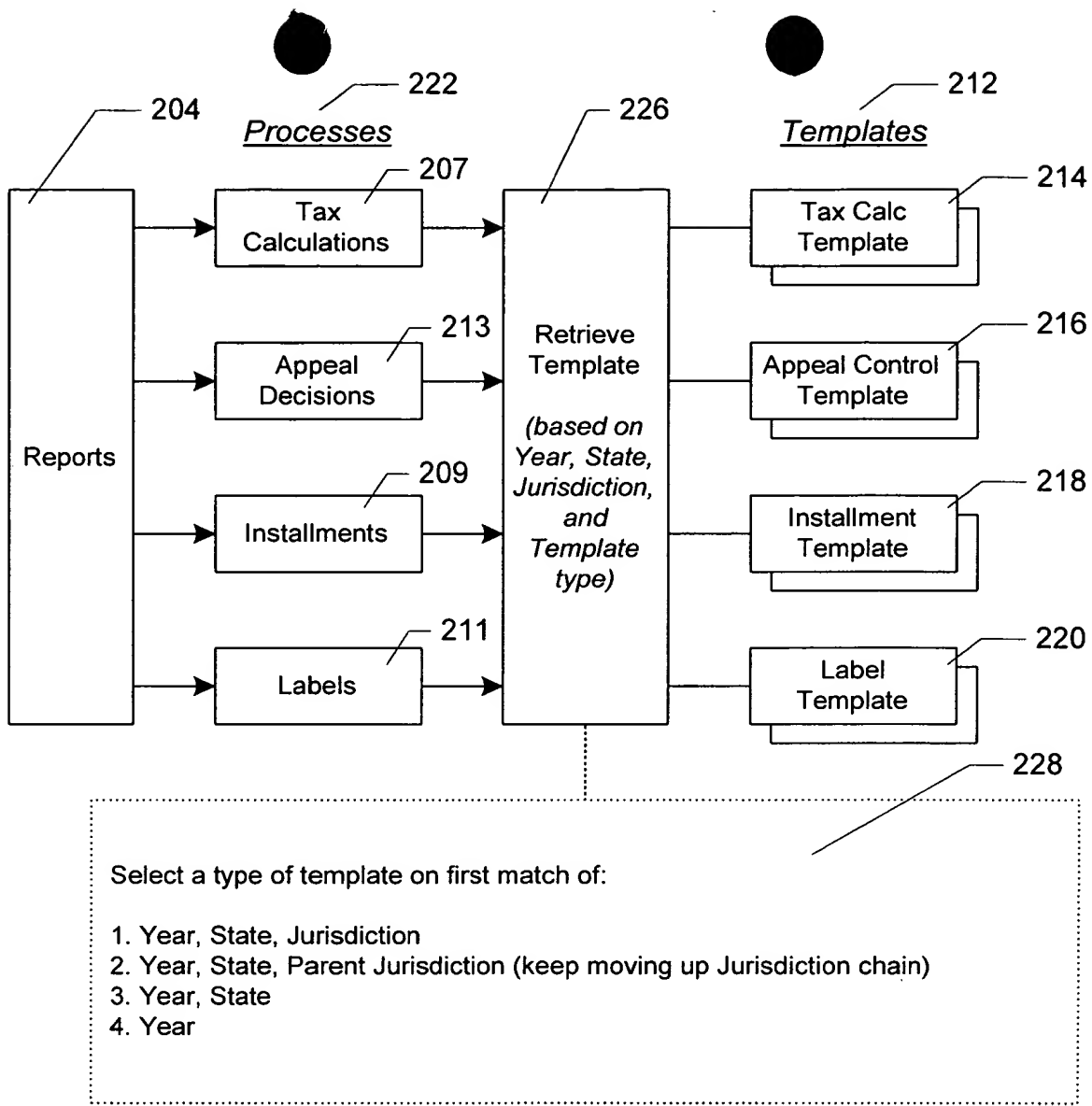


FIG. 3

Property Maintenance

Other Ed Navigation Save Property Assessment Info Rebuild Appeals Appeal Process Subparcel Budgets Accounts Payable

Year 1997 State AZ Juris Code MAR Mapsheet Blank ? Default Settings

General

Year 1997 State AZ Juris Code MAR Parcel ID ? Owner ? Region ? Appeal Juris ?

Prop Name ? Address ? City ? Zip Code ?

Prop ID ? Val ? Prop Ed ? Use Ed ?

Validation

Rate Year 1997 Val Year 1996 Rev Cycle 2

Units 1 Appraisal ? Owner's Opinion ? Purchase ? Prior Purchase ? 10K Price ? Transfer Tax ?

Appraisal Date ? Owner's Opinion Date ? Purchase Date ? Prior Purchase Date ?

Transfer Rate ? Scheduled Closing ? Disposal Date ?

Land

Land Area Acres 0.000

Improvements

Y.B.R. ? Area 0 Z.Crop 100.0

Imp (Sq Ft) 0

GIA (Sq Ft) 0

Base Value

Base Year 0000 % Increase 0.0000

Base Value 0.00

Notes

Go To Parent Show Template

232 234 254 258 262 264 266 268 270 272 274 276 278 230 236 238 240 242 244 246 248 250 406

FIG. 4 Parcel Record

Calculate Tax On These Jurisdictions

M&R

Add-->

<--Remove

All-->

<-- None

☒ Individual (Current Property Only)  
☐ Combined (Include Subproperties)  
☐ Both

OK Cancel Help

280 282

FIG. 5 Calculate Tax

284

286

282

288

752

754

**Assessment Track**

Type: ☒ RE ☐ FP ☐ SUP ☐ NAV

☒ Plug Tax Rate ☐ Projected

☐ This is a Private Tract

Track ID: 1

Tax Bkt: N25

Tax Bkt Amt: 0.00

FCV Rate: 0.100000

LPV Rate: 0.052680

Eq. Ratio: 1.00000

Descr:

☒ Include Assessment

This track supercedes:

On:

**Assessment Detail**

Subtype	FCV	Asd FCV	FCV Imp	FCV Land	Calc Tax Amount
Interim	900,000	720,000	400,000	500,000	109,929.60

Change Order: Move Up Move Down

Projected values are marked with an asterisk (\*)

Subtype: Interim Class: 5 ☐ Projected?

Actual Value		Land		Improvements	
FCV:	900,000	500,000	400,000	FCV Ratio:	80.000000
Asd FCV:	720,000	400,000	320,000	FCV Imp Ratio:	?
LPV:	900,000	Asd LPV:	720,000	LPV Ratio:	80.000000

FIG. 6 Assessments

292

290

Juris Cd	Dist Code	Description
MAR	031600	Light Industrial

Taxing Jurisdiction: MAR

Dist Code: 031600

Class: 8

FCV Rate: 0.037028

LPV Rate: 0.102171

Rate Year: 1997

☐ Special District

Type:

Amount: ?

FIG. 7 Districts

296 298 284 294

Appeal **Billing**

Select a Track and/or Appeal:

Type	Track ID	Prorata	ECA	Appeal Reference
PERPROP	PP1	No		
A REAL	1	No	No	

☐ Tracks With Appeal Activity

Appeal Record

Appeal #:  File #:  Billing#:  Date Created: 12/28/98

Appeal Ref:  Complainant:

Appeal Type: ☒ Standard Appeal ☐ Error Correction Appeal Override standard appeal at: Level: 0 Hearing: 0

Appeal Reasons:  Status:

Responsible Professional:  ☒ Allocated?

Working Professional:

Consultant:  ☐ Consultant Engaged

Appellant Code: ? Appellant Other Info:

Appeal Code: ? Appeal Other Info:

Refund Expected: ? Refund Received: ? Tax Credit: ?

Notes:

300

FIG. 8 Appeal Record

296 298 302

Appeal **Billing**

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

☐ Tracks Currently Under Appeal

304

Billing Information		Fee Agreement #1		Fee Agreement #2		Fee Agreement #3	
Billing Type	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount	Final Amount
Contingency	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	0.00
Flat	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	0.00
Hourly	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	0.00
Form:			Form:			Form:	

☐ Multiple Years Final Year:

Referral

Firm:  Contact:

☒ Contingency ☐ Flat Fee Amount:

FIG. 9 Appeal Billing

306

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal

☐ Tracks Currently Under Appeal

Level	Hearing	Tax Amount	Calc Tax Amount	Appeal Level	Hearing	Appeal #	Class
1	1	1,000.00	?	1	1	3001	5

☒ File Appeal    ☐ Outside Appeal  
☐ Litigation    ☐ Skip Level

Requested	Actual Value	Land	Improvements	Date	Time
Requested FCV: 9,000	90,000	20,000	70,000	Filing Deadline: 12/01/97	12:00 PM
Requested Asd FCV: 900	90,000	20,000	70,000	Date Filed: 11/30/97	09:00 AM
FCV Ratio: 10.00000000	100.00000000		FCV Imp Ratio: ?	Hearing: 01/20/97	02:00 PM
Requested LPV: 8,000	89,000	Requested LPV Ratio: 99.00000000		Decision: 02/19/98	04:00 AM
Requested Asd LPV: 7,920	89,000	Actual LPV Ratio: 100.00000000			

FIG. 10 Appeal Process

307

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	gbsdfgsfg
000-00-0006	Patti's Property	Just a really big property.

Switch To Subparcel:

Parcel:

FIG. 11 Subparcels

310

Budget Name: **Default**

NAV Only: no

Personal Only: no

Real Only: yes

Sup Only: no

312

Budget Name:

Date Saved:  Time Saved: 4:54 pm

Saved By:  ☐ Combined Property

Annual Increase Rates

FCV Increase: 0.00000 FCV Rate Increase: 0.00000

LPV Increase: 0.00000 LPV Rate Increase: 0.00000

Other Parameters

Years To Forecast: 10 ☐ Entire Property

Equalization Ratio: 1.00000 ☐ Track Installments

Budget On This Track Type

☐ Real ☐ Personal ☐ Supplemental ☒ NAV

Notes:

332

334

336

Open Budget

Select Default Budget

Combine Budgets

Create new budget parameters or edit existing ones. When you're ready, press 'Open Budget' to go into the budget worksheet.

308

314

316

320

318

324

326

322

328

FIG. 12 Create Budgets

338

Budget Worksheet for Scot Test

Property Year: 1997 State: AZ Juris Cdt: Mar Parcel: 222-22-222A

Prop Name: Parker Residence Prop ID:

Budget Name: Scot Test ☒ Real ☐ Personal ☐ Supplemental

TV Increase: 0.02000 OV Increase: 0.00000 Years To Forecast: 10

TV Rate Increase: 0.02000 OV Rate Increase: 0.00000 ☐ Combined Budget

Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax
1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00
1998	102,000	0.030600	0.0000	200,000	0.000000	10.0000	0.00
1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00
2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00
2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00
2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00
2003	112,616	0.033785	0.0000	200,000	0.000000	10.0000	0.00
2004	114,869	0.034461	0.0000	200,000	0.000000	10.0000	0.00
2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00
2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00

Budget Status: This budget is saved.

Tax Year	Installment	Tax	Date Due	Total Payment
1997	1	150.00	11/03/1997	150.00
1997	2	150.00	05/01/1998	300.00

Show:

☒ Tax From 1997

☐ Installments Due in 1997

Save Budget

Recalculate Budget

Restore to Last Saved

Start Over

Exit

340

342

344

346

FIG. 13 Budget Worksheet



348

#	Required Date	Payee	Asmt Type	Track ID	Tax B#	Total Due	Disc Amount	Total Payments	Payment Date
1	07/01/97	AZ-MARICOPA-T	PERPROP	PP1	PP35163135165165	25,000.00	0.00	25,000.00	07/01/97
1	11/03/97	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	07/01/97
2	05/01/98	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	05/01/98

Asmt Types: ☒ Real ☐ Supplemental ☐ Personal Property ☐ NAV Track ID: 1

Installment: 0 ☐ Estimate? Payee: AZ-MARICOPA-T

Tax B# 7 Chk Req #: 0 Check Num: 0

Chg Less Disc: 130,929.60  
Payments: 130,929.60  
Balance to Pay: 0.00  
Unpaid Amt: 0.00

Charges: Date: Principal: 0.00 Penalty: 0.00 Interest: 0.00  
Discount: 0.00  
Payments: 0.00 0.00 0.00

Status: Released

Auto Add

Entry Date: Mailed Date:

Notes Other: 0.00

350

FIG. 14 Accounts Payable

352

**Auto Add**

A/P Entries

☒ Divide into Installments

☒ Include Discounts

☒ Include Payments

☐ Skip Tracks Already Brought Over

OK

Cancel

Track Types

☒ Real ☐ Supplemental ☒ Personal ☐ NAV

This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.

**This jurisdiction is getting its rules from:**

Arizona (Real)

Arizona (Personal)

FIG. 15 Auto Add

260 366 354

Client ID	Name	Active?
2802	HUNTERS GLEN APARTMENTS	Y
2803	LIBERTY HILL	Y
2804	FIRST UNION REAL ESTATE EQUITY	Y
2805	RONISHOFFER	Y
2806	BANK ONE (CHICAGO)	Y
3040	3040 North 44th Street Partner	Y
777INVE	777 Investments LLC	Y
9998	Ashley Eleanor Merritt	Y

Client ID: 1001

368

356

Client ID: 9998 Client Name: Ashley Eleanor Merritt Client #: 9998 Billing #: 9998 Contact:

Type: Client SubType: Current Responsible Attorney: Rich J. Truly

358

Address: 8000 N. Barney Lane

Mailing Address: P. O. Box 7

City: Phoenix State: AZ Zip: 85020

E-Mail Address: ashley@naccarati.com

Phone: 602-900-9998 Extension: Fax: 602-900-9997 Region: Active: Y

360

362

Parent ID: 9999 Patti Naccarati Referral ID: Referring Individual: Referral Term:

364

FIG. 16 Address Information

370

372 454 452 456 490

371

Indv ID Full Name

1	Jackie D. Quinn
---	-----------------

Individual ID: Contact Type: Accounts Payable

Full Name: Title:

First Name: Last Name: Salutation:

Phone: Business Ext:

☐ Address is Same as Client

Address 1: Address 2: Address 3:

City: State: ZIP:

E-Mail:

FIG. 17 Contacts

374

Referrals for Ashley Eleanor Merritt

Effective Date	Type	Active	Amount	Comments

Type: Flat Amount: 10.00 Effective Date: 07/06/1998

Comments: This is a really big referral fee.

☒ Set As Active Active: no

OK ? Help

FIG. 18 Referral

380

Individual Id	Name	Title	Number
MKP	Michael Krushoy, Personal	Attorney	99
MSK	Mya S. Krinsky	Attorney	102
PN	Pat Naccarato	Attorney	9999
RDN	Richard D. Nearhood	Attorney	1
RDN1	R. Nearhood	Attorney	1
RJT	Rich J. Truly	Attorney	103
WIS	Will Stein	Attorney	100
WS	Will Stein, Jr.	Attorney	101

Individual Id: AEM Title: Little Lawyer

Name: Ashley Eleanor Merritt

Number: 999 Attorney: N

FIG. 19 Working Professionals

392

394 396 398 400 402 404

Docket and Calendar

Calendar Docket Entry

Event Information For 07/01/98

Date	Time	Event Type	Event	Property Info	Comments
07/01/98	12:00 A	Appeal Process	FILING-OLINE	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILED	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILING-OLINE	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILED	1997 AZ MAR 102-47-001P	
07/01/98	12:00 A	Appeal Process	FILING-OLINE	1997 AZ MAR 102-47-001P	

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Year: 1997 State: AZ Juris Code: Mar Maricopa Client: NACCARATO

Parcel #: 100-02-9993 Prop Name: Patti's Store Client: NACCARATO

Appeal #: 9999 FILING: 9999

ACTIVE / Level 1 Appeal Ref: Already by appeal

Default Information

Enter values in these fields to set defaults only. Property-specific information will only be used if "Show: Current Property Only" is selected or if property-specific docket entries are created.

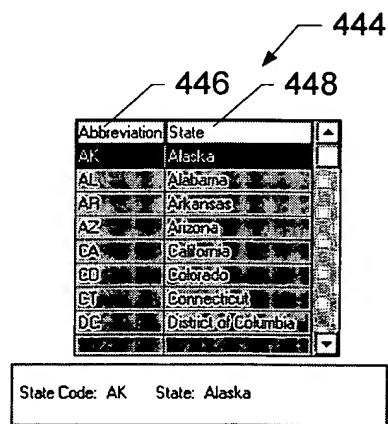
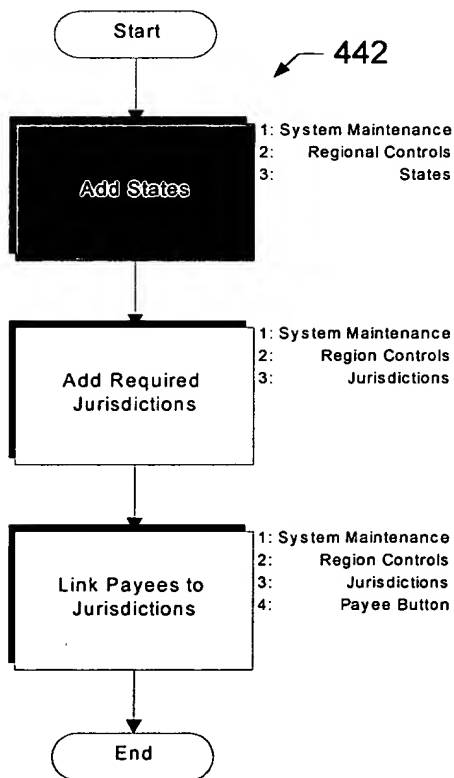
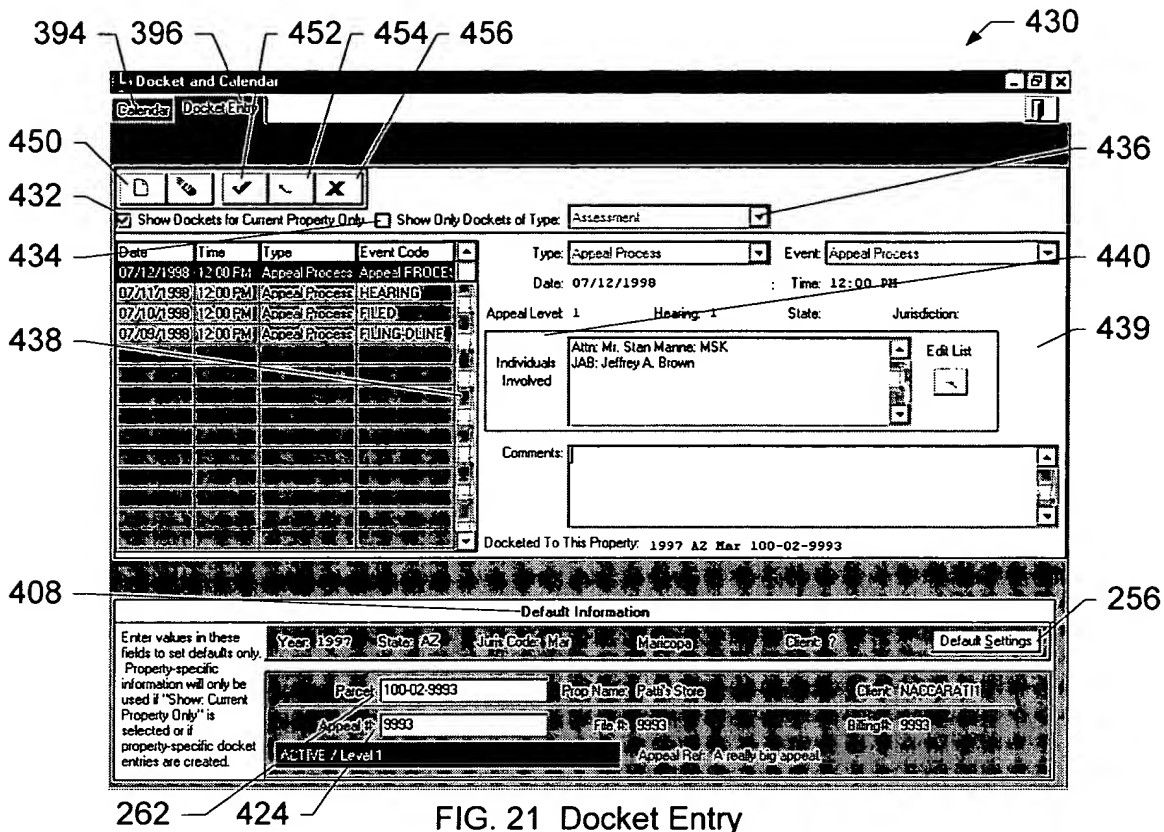
Year: 1997 State: AZ Juris Code: Mar Maricopa Client: NACCARATO

Parcel #: 100-02-9993 Prop Name: Patti's Store Client: NACCARATO

Appeal #: 9999 FILING: 9999

ACTIVE / Level 1 Appeal Ref: Already by appeal

FIG. 20 Calendar



458

406

**Jurisdiction Maintenance**

Other Edit Navigation Save

234

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

1. Select a state.

2. Select a jurisdiction.

Juris Code	Juris Name	Rate Year	Parent Jurisdiction
APA	Apache	1995	
COC	Coconino	1995	
COCHISE	Cochise	1995	
GIL	Gila	1995	
GRA	Graham	1995	
GRE	Greenlee	1995	

Sub-Jurisdictions:

Juris Code	Juris Name

☐ Show Parent Jurisdictions Only

State: AZ      Juris Cdt:      Juris Name:

Rate Year: 0

Parent Juris Code:      Parcel Format:      Default Payee ID: ?

Payees      Show Templates

FIG. 24 Jurisdiction Set Up

476

406

452

456

**Payees for MAR/AZ**

482

Payee ID:      ☐ Set As Default

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

480

Payee Detail

Client ID	Client Name	Client #	Billing #
MCT	Maricopa County Tax Collector	MCT	MCT

Type: Collector      SubType: [None]      Responsible Individual: [None]

Address: 121 W. Jefferson

Mailing Address:

City: Phoenix      State: AZ      Zip: 85001

E-Mail Address: taxcollector@maricopacounty.com

Phone: 602-565-0000      Extension: 2

Fax: 602-565-0001      Region:      Active: Y

Parent ID:      Referral ID: ?      Referring Individual:      Referral Term:

Notes:

FIG. 25 Jurisdiction Payee

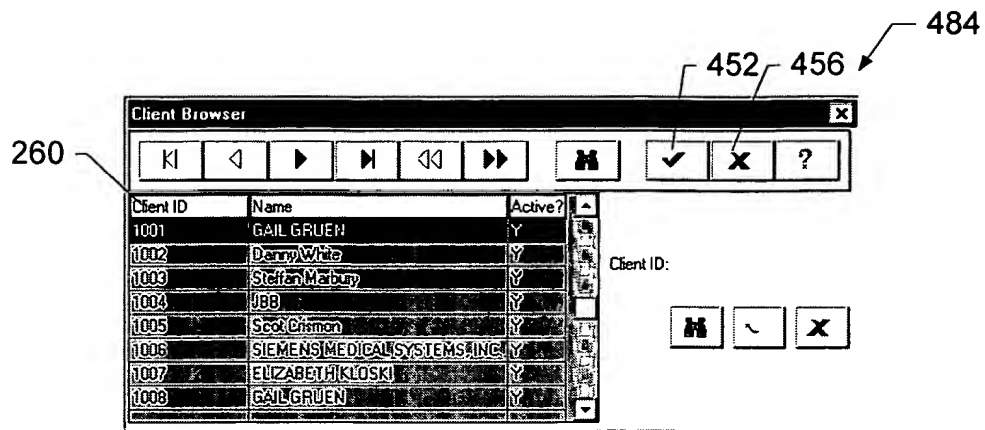


FIG. 26 Client Browser

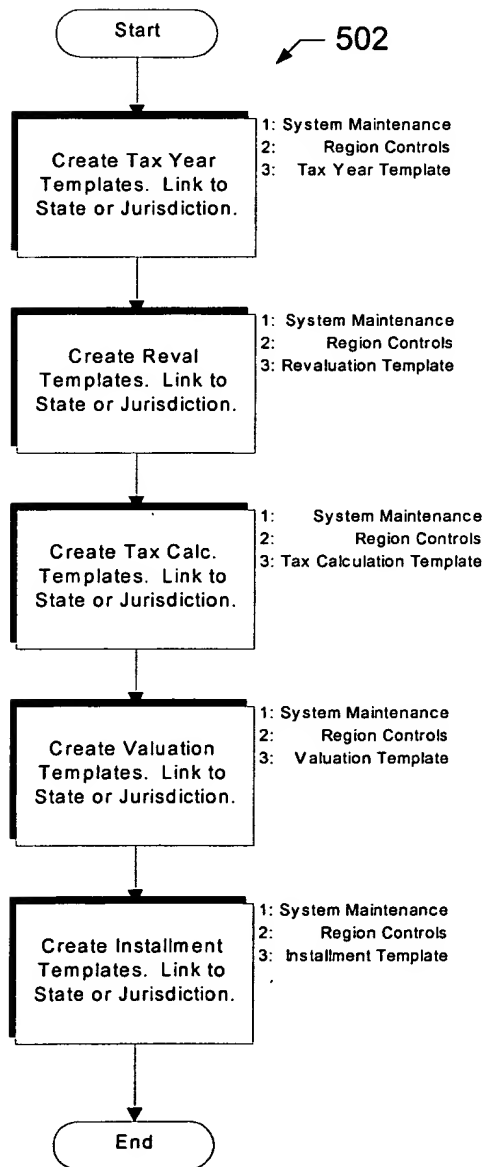


FIG. 27 Templates

FIG. 28 - TAX YEAR TEMPLATE

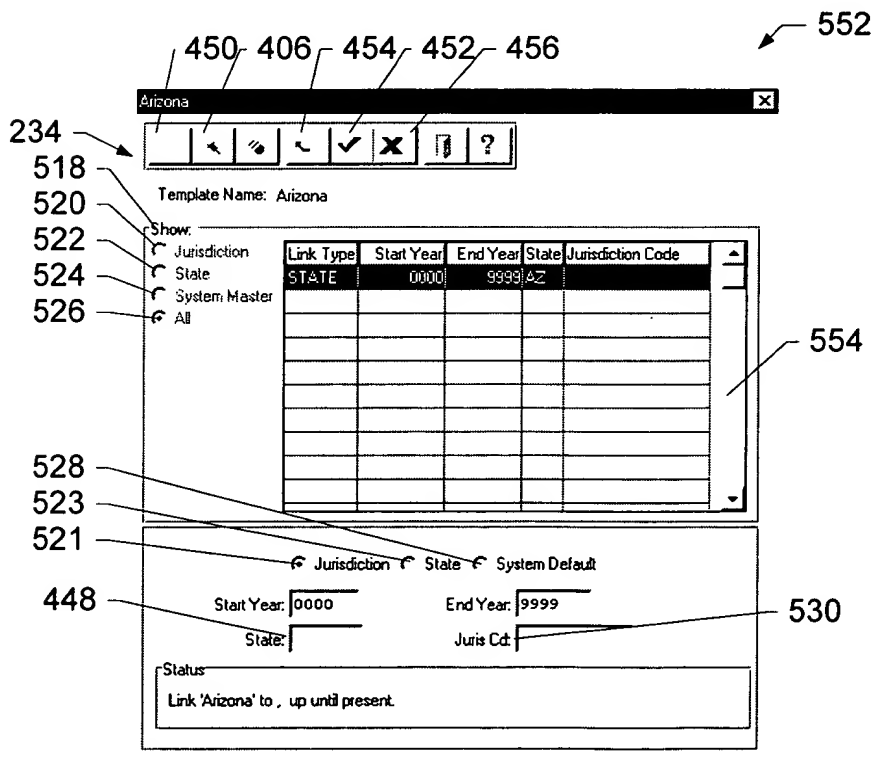
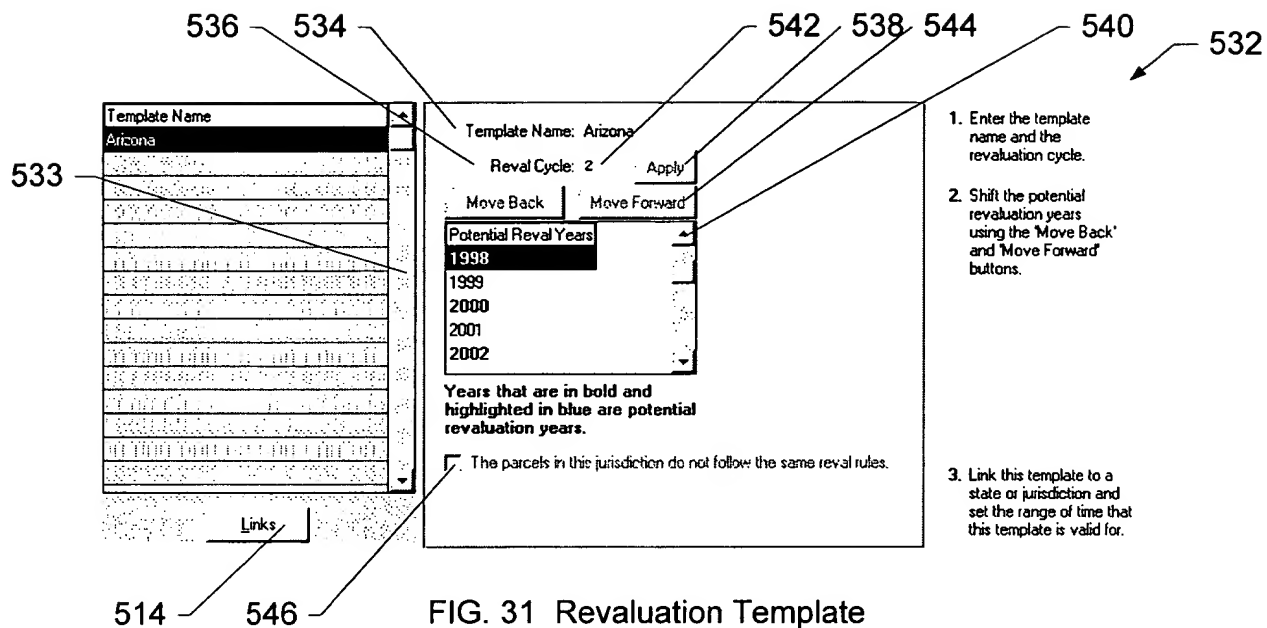
FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

FIG. 29 Tax Year Template Link To

FIG. 30 Templates by Year

FIG. 30 Templates by Year





562 Description

564 TV Controls

566 ☒ Use TV In Calculations

568 ☐ Use Market Value

570 ☐ Use Assessed Value

572 ☒ Use TV ER

574 ☐ Percent

576 ☐ Rate

572 ☒ Use TV Asmt Ratio

574 ☐ Percent

578 ☐ Rate

584 ☐ Single TV Ratio

586 ☐ Sep. Ratios for Land & Imp

585 District Tax Rate Use

587 ☐ Percent

588 ☐ Rate

588 ☐ Millage

592 OV Controls

594 ☒ Use OV In Calculations

573 ☐ Use Market Value

575 ☐ Use Assessed Value

556 ☒ Use ER with OV

596 ☒ Use OV Asmt Ratio

591 ☐ Percent

593 ☐ Rate

595 ☐ Use TV instead of OV Ratio

598 District Tax Rate Use

596 ☐ Percent

596 ☐ Rate

596 ☐ Millage

596 ☐ Use TV Instead of OV Rates

596 ☐ Ignore

596 Description

596 Arizona

596 Bexar Tax rules

596 CALIFORNIA

596 Crismon Tax Rules

596 Illinois

596 Iujan tax rules

596 Money tax rules

596 Skid Tax Rules

596 Virginia Tax Rules

596 Link To...

600 FIG. 33A Tax Calculations

406 Tax Calculation Template

452 Other Edit Navigation Save

454

456

566

559

558

450 Description

568 685

576 AK(?)

572 AL(?)

574 AZ(?)

584 AZ-Conv(?)

CA-Conv(?)

Chris' Tax Calc

CO-Mill

CO-Rate

CT(?)

CT-Conv(?)

DCI(?)

FL

FL-Conv

GA-CI Alpharette(?)

GA-Rich&Clay(?)

IA(?)

IL-Cook(?)

IL-DuPage(?)

IL-Lake Knox(?)

IL-Prior

IN(?)

KS(?)

KY(?)

LA(?)

560 Link To...

567 In Calculation

569 Allow Entry Calc

594 ☐ Use Other Value

572 ☐ Use Assessed Value

574 ☐ Use Assessed Other Value

596 ☐ Do Not Use Other Value

591 ☒ Use TV Asmt Ratio

593 ☐ Use OV Asmt Ratio

595 ☐ Percent

596 ☐ Straight Rate

592 ☐ Use TV Ratio instead of OV Ratio

TV District Tax Rates

☐ Percent (or Per \$100 of Value)

☐ Straight Rate

☐ Millage (or Per \$1000 of Value)

☐ Use Equalization Ratio

☐ Percent

☐ Straight Rate

Appeal Process Follows Different Rules On Screen

Market Value: ☐ Allow Entry Calc

Assessed Value: ☐ Allow Entry Calc

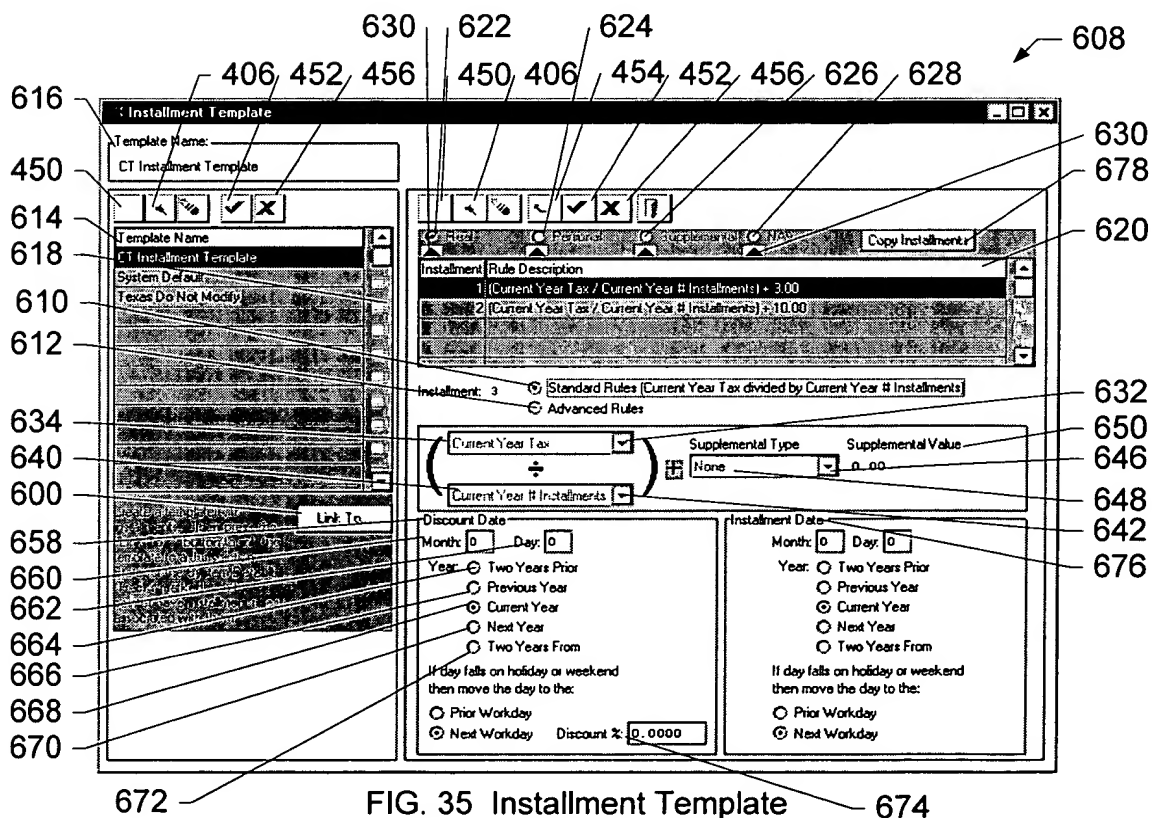
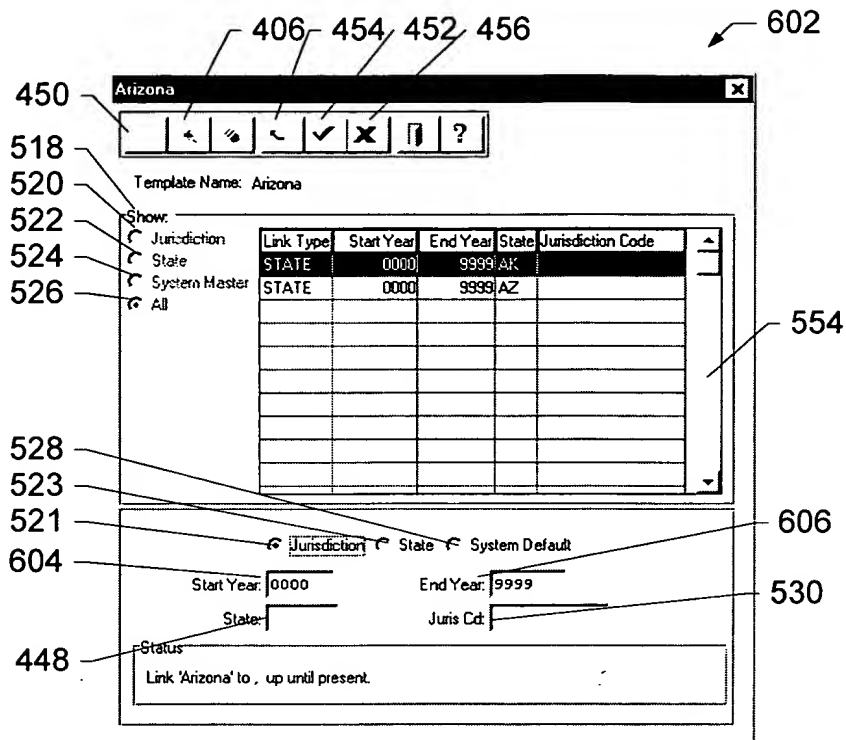
Asmt Ratio: ☐ Allow Entry Calc

Other Value: ☐ Allow Entry Calc

Assessed Other Value: ☐ Allow Entry Calc

Other Asmt Ratio: ☐ Allow Entry Calc

570 600 572 574 FIG. 33B Tax Calculations



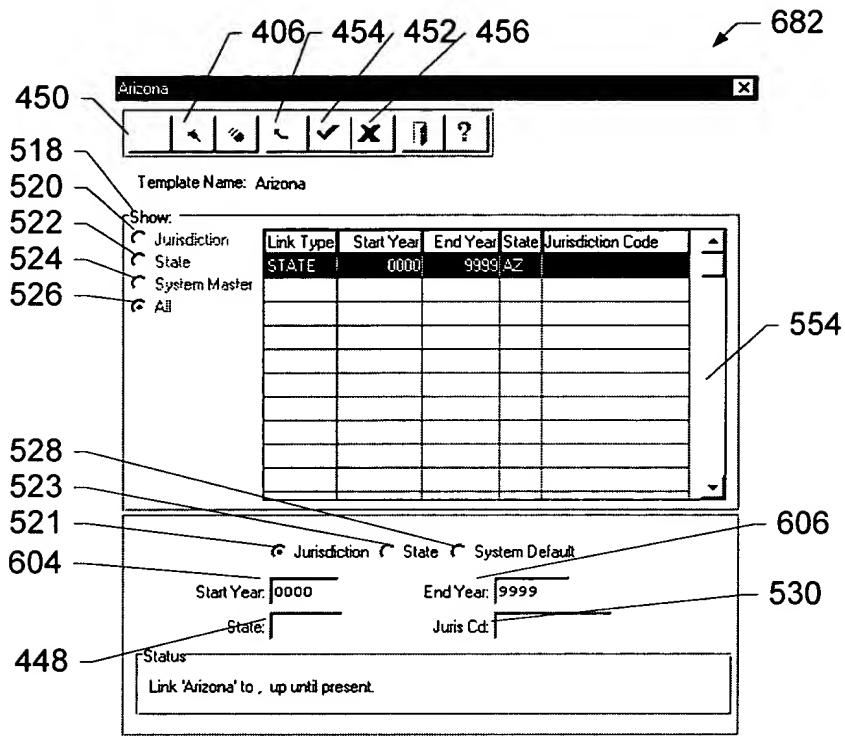


FIG. 36 Installment Templates Link To

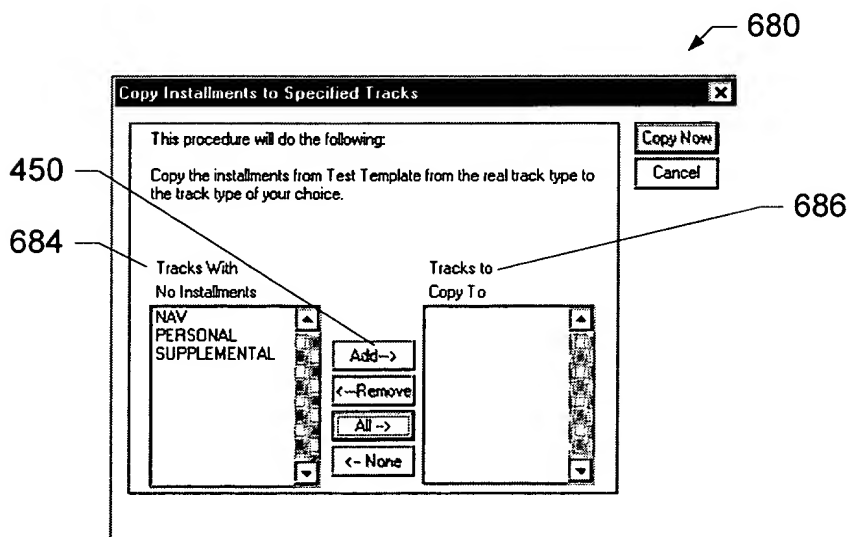


FIG. 37 Copy Installments Dialog Box

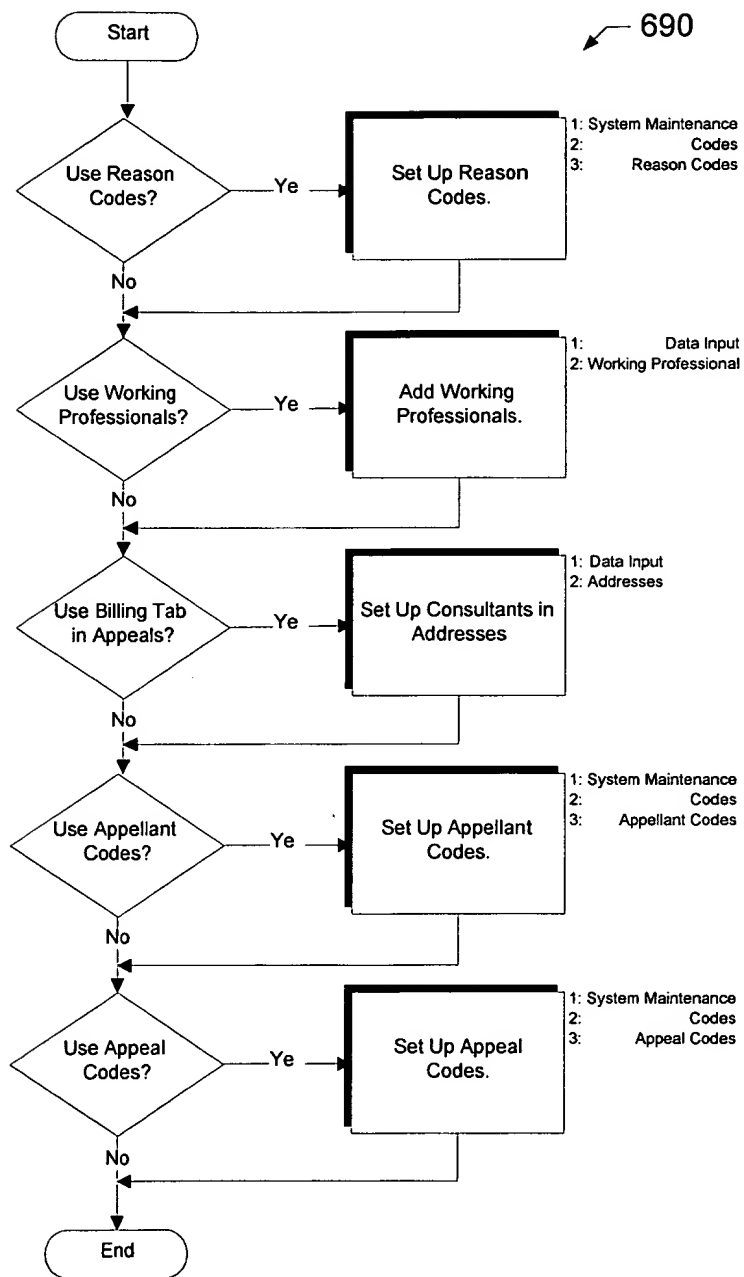


FIG. 38 Appeals Set Up

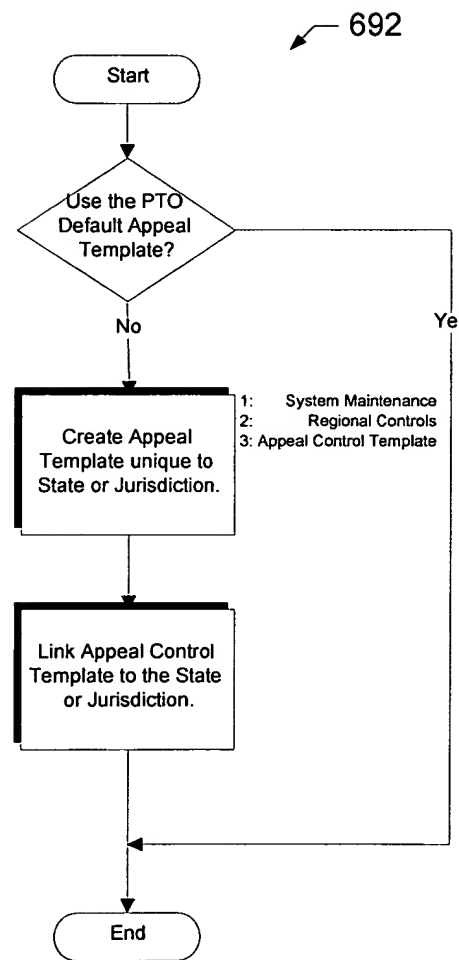


FIG. 39 Appeal Control

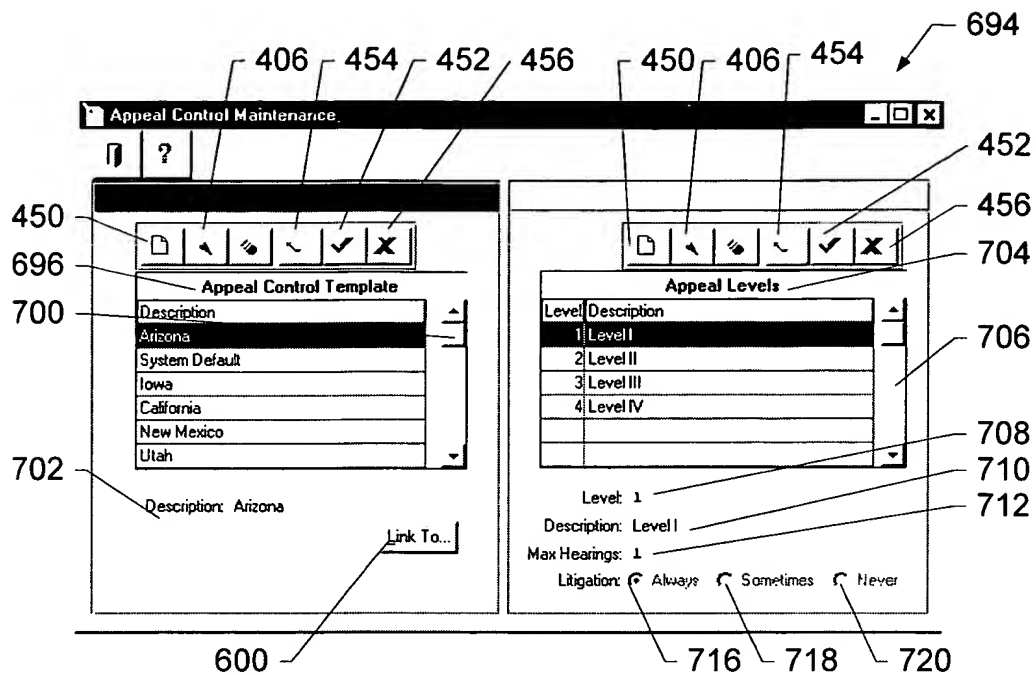


FIG. 40 Appeal Control

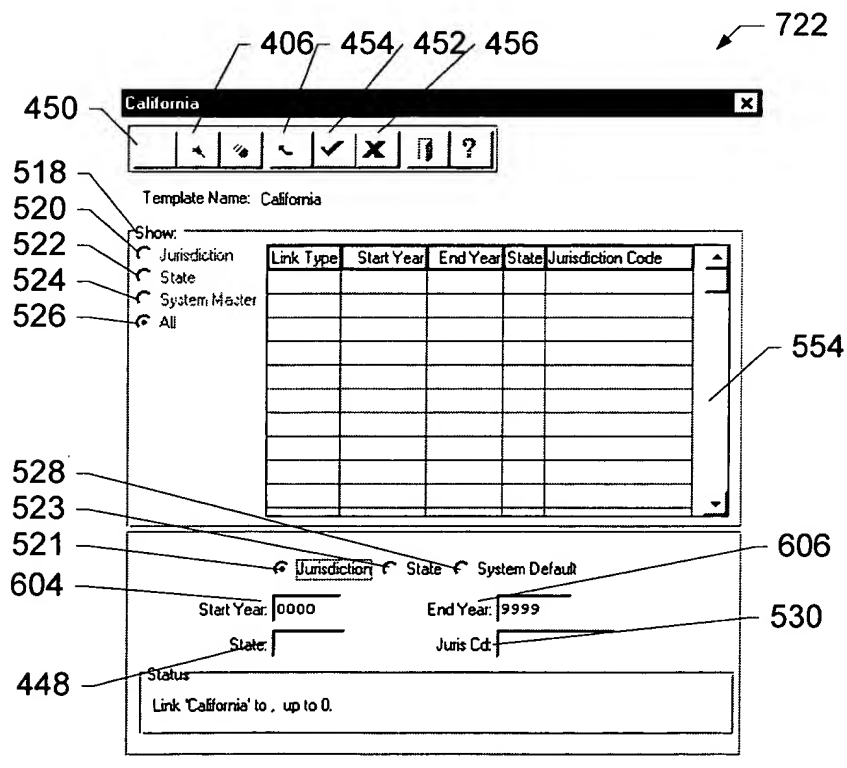


FIG. 41 Appeal Control Link

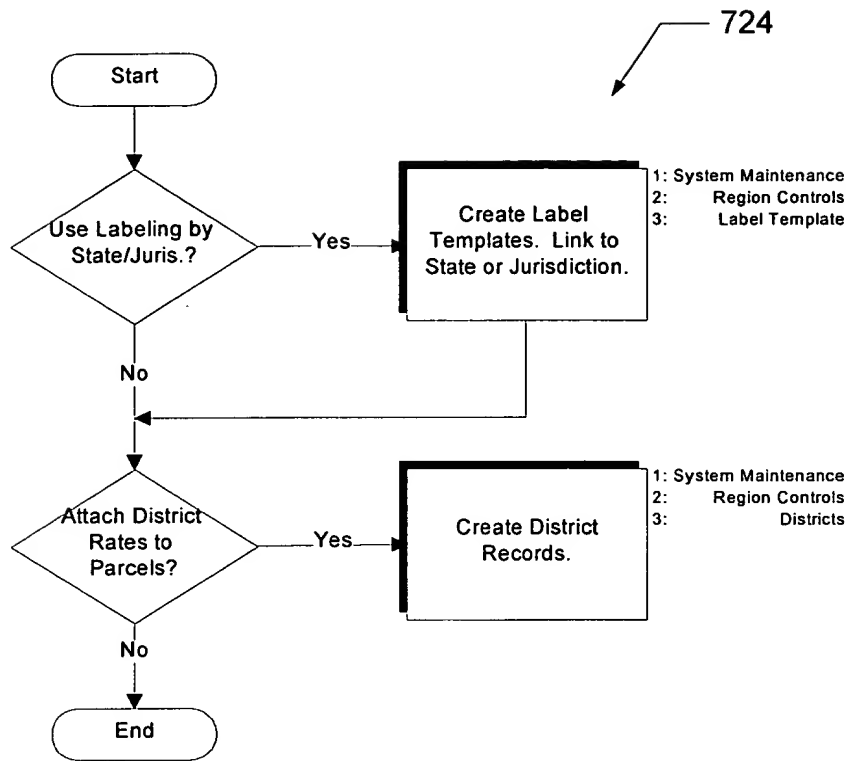


FIG. 42 Dynamic Labeling and Districts

Label Name: 731

730

728

734

732

736

740

Link To...

1: System Maintenance  
2: Region Controls  
3: Label Template

1: System Maintenance  
2: Region Controls  
3: Districts

600 FIG. 43A Label Template



744

Dist Code	Classification	TV Rate	OV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097567

762

456

454

746 Dist Code: Class: [Add] [Reset] [Delete]

748

750 Dist Code: [ ] Description: [ ]

756 Class: [ ]

752 TV Rate: [0.000000]

754 OV Rate: [0.000000]

758 ☐ Special District

760 Type: [ ]

Use in Update?: ☒ Y

FIG. 45 - District Set Up